



Candidate Information

Position: Portfolio Manager
School/Department: Research and Enterprise
Reference: 23/111508
Closing Date: Monday 22 January 2024
Salary: £46,497 - £57,141 per annum.
Anticipated Interview Date: Friday 2 February 2024

JOB PURPOSE:

To provide dedicated commercial resource responsible for monitoring and reporting the performance of the extensive QUBIS portfolio of high growth companies across multiple sectors (e.g. biotech, medtech, manufacturing, consumer products, ICT, digital media, Fintech) and to provide a comprehensive, professional reporting service to both the Director of Innovation/QUBIS CEO and the Head of Spinouts and Investments with a remit to produce timely business critical information and analysis on portfolio performance for investment purposes.

MAJOR DUTIES:

1. Actively seek to monitor the performance of the investment portfolio.
2. Prepare monthly, quarterly and annual reporting requirements for Stakeholders/Funders focusing on individual company performance (funding raised, financial metrics, employment) and fund performance (portfolio valuations, growth in financial metrics, and Fund investment returns), and tracking Fund investment enquiries and investment pipeline.
3. Establish reporting framework for new portfolio companies to ensure a seamless transition into the portfolio.
4. Liaise with Investment Management team to collect monthly financial and KPI data from portfolio companies.
5. Participate in Investment Committees, including writing minutes.
6. Provide information and responses to Stakeholders regarding audit, economic appraisal and economic development queries.
7. Plan, develop and manage programmes of work which ensure an increased stream of income from technology transfer and spinout activity.
8. Contribute to the financial reporting for commercialisation, the patent portfolio and client relationship management systems.
9. Management of key relationships with spin-out companies and organisations in the private sector as 'clients'.
10. Liaison with entrepreneurs, investors and partners in the development of spin-out ventures.

ESSENTIAL CRITERIA:

1. A professional accountancy qualification.
2. A member of a recognised accountancy body.
3. Substantial relevant experience in an corporate finance, fund management or financial services environment.
4. Strong project/portfolio management and organisational skills, with a proven ability to multi-task, prioritise workloads and operate well in a team.
5. Robust spreadsheet skills (Excel).
6. Excellent report writing and presentation skills with a well-developed critical and analytical approach to reviewing documentation.
7. Excellent presentation skills with the ability to communicate both orally and in writing and relate to others at all levels both internally and externally.
8. Excellent analytical skills and strong commercial awareness.
9. Ability to work independently.

DESIRABLE CRITERIA:

1. An Investment Management Qualification.
2. Experience of investment portfolio reporting.

3. Experience of communication management experience.
4. Experience of screening and reviewing investments.
5. Database, CRM and Investor Platform Management skills.
6. Investment portfolio reporting experience.
7. Takes ownership for and delivers results.
8. Strong stakeholder management; the ability to manage a range of stakeholders both internally and externally, and the resilience to challenge them.
9. Ability to identify and evaluate commercial and financial risk, and to take steps to mitigate risks and/ or to drive value add.
10. Demonstrate creative thinking and innovation with an ability to convey the complex in a simple and meaningful manner.